

CHECKLIST FOR MANAGERS

ASSESSING REQUESTS FOR FLEXIBLE WORK PRACTICES

Use this checklist to help you appropriately assess and implement employee's requests for flexible work practices. This checklist should be read in conjunction with the WA Health Work Life Balance Policy.

DETAILS OF REQUEST	
<input type="checkbox"/> Request received	<ul style="list-style-type: none"> ○ Has the request been submitted in writing? ○ Is the request clear and comprehensive, does it provide sufficient information to enable the manager to make a fair decision?
<input type="checkbox"/> Duration	<ul style="list-style-type: none"> ○ Is this a permanent or temporary arrangement? ○ What is the proposed start and end date (if applicable)?
<input type="checkbox"/> Trial Period	<ul style="list-style-type: none"> ○ Will there be a trial period? How long will the trial be for? ○ How will the trial be assessed? What criteria will be used to assess if the trial is successful?
<input type="checkbox"/> Schedule and continuity	<ul style="list-style-type: none"> ○ What is the proposed work schedule? How do the proposed hours reflect the peak activity and demands in your work area? How will work continuity be maintained?
<input type="checkbox"/> Flexibility	<ul style="list-style-type: none"> ○ What flexibility does the employee have to alter their work arrangement on an adhoc basis to cover peak periods, attendance at meetings, training courses etc. for example, changes to hours or days of work?
<input type="checkbox"/> Employee's responsibilities	<ul style="list-style-type: none"> ○ It is the employee's responsibility to consider the impact of the flexible work practice on their pay, taxation, superannuation, leave provisions and other entitlements. Do you know if the employee has made enquiries in these areas?
ASSESSMENT OF REQUEST	
<input type="checkbox"/> Confidentiality	<ul style="list-style-type: none"> ○ Maintain confidentiality, particularly in relation to employee's personal circumstances. Where discussion with others is required in order to assess or review a request, ensure only relevant details are disclosed and discussion is restricted to relevant parties only.
<input type="checkbox"/> Individual's needs	<ul style="list-style-type: none"> ○ Consider individual employee's circumstances and reasons for their request. Are their needs likely to change over time? Does the arrangement provide sufficient flexibility to alter if the employee's needs change in the near future?
<input type="checkbox"/> Employee's skills and suitability	<ul style="list-style-type: none"> ○ Does the proposal address individual strengths and weaknesses of the employee? Consider employee's skills and ability to manage their work role while undertaking a flexible work arrangement. Is specific training or development required to address skill shortages, for example, time management skills may need to be developed when an employee reduces their hours of work.

<input type="checkbox"/> Position Suitability	<ul style="list-style-type: none"> ○ Is the nature of the work/job role conducive to a flexible work arrangement? What are the issues and how will these be managed?
<input type="checkbox"/> Supervisory Responsibilities	<ul style="list-style-type: none"> ○ For positions with supervisory responsibilities, consider strategies for ensuring adequate supervision levels are maintained.
<input type="checkbox"/> Organisation's needs	<ul style="list-style-type: none"> ○ Consider the affect the employee's request will have on the organisation: <ul style="list-style-type: none"> ○ Is the request in line with Health Strategic Direction? ○ Does the request contribute to the implementation of operational/work plans? ○ How will the request affect staffing requirements? ○ Is the flexible work arrangement responsive to changing needs of the organisation?
<input type="checkbox"/> Operational requirements	<ul style="list-style-type: none"> ○ Consider operational requirements: <ul style="list-style-type: none"> ○ The availability of suitable leave cover if required. ○ The cost implications. ○ The impact on client/patient service requirements.
<input type="checkbox"/> Impact on Co-workers	<ul style="list-style-type: none"> ○ How will the new arrangement impact the job role, workload and morale of other employees? How will this be managed? ○ What are the concerns, objections or barriers? How can these be addressed?
<input type="checkbox"/> Employment Conditions	<ul style="list-style-type: none"> ○ Does the employee's industrial agreement contain conditions pertaining to their request? Ensure the request meets the requirements contained within their Award and/or Agreement.
<input type="checkbox"/> Equal Opportunity Legislation	<ul style="list-style-type: none"> ○ When assessing requests, consider legislative requirements including family responsibility as a ground for discrimination.
<input type="checkbox"/> Policy requirements	<ul style="list-style-type: none"> ○ Ensure you are familiar with the WA Health Work Life Balance Policy and its principles are being upheld? ○ Refer to any WA Health or Health Service policy / guidelines that apply to this request, for example the Part time/Job Share Policy and Guidelines. Have you and the employee both read the applicable policy and understand the requirements. Is the employee's request in line with policy requirements?
<input type="checkbox"/> Identify the benefits	<ul style="list-style-type: none"> ○ Identify benefits to the employee, work group and organisation associated with this flexible work practice.
<input type="checkbox"/> Identify the disadvantages	<ul style="list-style-type: none"> ○ Identify disadvantages arising out of the flexible work practice. Weigh up the advantages and disadvantages.
DECISION MAKING PROCESS	
<input type="checkbox"/> Case by Case	<ul style="list-style-type: none"> ○ Assess requests on a case-by-case basis. Also consider other flexible work arrangements currently in place and how these will interact with one-another (if applicable) and potential flow-on. Do not deny requests based on the possibility of potential flow-ons but be conscious of the impact this may have on other employees.
<input type="checkbox"/> Decision making	<ul style="list-style-type: none"> ○ Have you involved the employee and other affected parties in your decision making process?

	<ul style="list-style-type: none"> ○ Have you spoken with Human Resources, Industrial Relations or other relevant experts to assist in making a decision? ○ Have you fully and properly considered the request, in a timely manner? (Do not unnecessarily delay assessment of the request, as this is potentially unfair to the employee). ○ Is your decision making process fair, transparent and capable of review? ○ Have you documented your decision and factors considered in making your decision? Are you able to justify the reasons for your decision? ○ Have you advised the employee of the outcome of their request, both verbally and in writing and included a full explanation for your decision?
<input type="checkbox"/> Negotiation	<ul style="list-style-type: none"> ○ Where an original request may not be appropriate, negotiate with the employee alternative arrangements that will suit the needs of all parties involved.
GRIEVANCE PROCEDURE	
<input type="checkbox"/> Grievance Procedure	<ul style="list-style-type: none"> ○ Grievance Resolution Procedures exist to provide safeguards for employees and managers and to resolve grievances in a fair and reasonable manner. It is important for managers to be aware of the following processes that exist: <ul style="list-style-type: none"> ○ The internal grievance procedure (it is most desirable to find resolutions at a local level) ○ Mediation – the next option after exhausting the internal grievance procedure ○ External – Conciliation through the Equal Opportunity Commission or tribunal ○ External – WA Industrial Relations Commission ○ External – Office of the Public Sector Standards Commissioner ○ Where requests are denied the applicant should be made aware of local grievance procedures available to assist employees who are not satisfied with the outcome.
DOCUMENTATION	
<input type="checkbox"/> Documentation	<ul style="list-style-type: none"> ○ Prepare a suitable agreement to document the conditions associated with the flexible work arrangement agreed between the parties involved. The agreement may address the following issues: <ul style="list-style-type: none"> ○ Parties to the Agreement ○ Duration (including start and end date, and trial period) ○ Days/hours of work and rostering details ○ Communication arrangements (including communication with co-workers, supervisor, job share partner if applicable, out-of-hours contact etc) ○ Changes to job role, duties or functions undertaken ○ Any requirements relating to supervisory responsibilities

	<ul style="list-style-type: none"> ○ Any issues related to operational requirements including dealings with patients/clients ○ Requirements in relation to taking leave eg job share partners are often asked to cover each others periods of leave and therefore cannot take leave at the same time ○ Assessment and review arrangements and criteria (refer to section on Review for further details) ○ Future of the flexible work arrangement – process for either party to alter the terms of the arrangement, discontinue the arrangement, extend the trial or temporary arrangement for a further period or confirm permanent arrangements ○ Process for managing concerns or grievances related to the flexible work arrangement.
IMPLEMENTATION	
<input type="checkbox"/> Notification	<ul style="list-style-type: none"> ○ Notify Human Resources and other relevant parties, including co-workers and regular clients about the change in working arrangements. ○ Ensure documentation is filed appropriately i.e. on an employee's private and confidential personal file.
<input type="checkbox"/> Best Practice Examples	<ul style="list-style-type: none"> ○ Identify other flexible work arrangements that have been successful and achieved positive outcomes, use these examples as a guide for implementing this arrangement.
<input type="checkbox"/> Assess Risks	<ul style="list-style-type: none"> ○ Address any potential risks involved in implementing the flexible work practice, for the employee, co-workers and patients/clients. ○ Review Occupational Health and Safety requirements to ensure safe working conditions? For example, a safety inspection of an employee's home may be a requirement in order to establish telecommuting?
<input type="checkbox"/> Job Redesign	<ul style="list-style-type: none"> ○ Jobs may need to be redesigned and duties re-assessed to ensure they are suitable and achievable under the new flexible work arrangement. Where this occurs, job description forms or duty statements may need to be amended accordingly. ○ Check workload is appropriate to the new hours of work.
<input type="checkbox"/> Supervision	<ul style="list-style-type: none"> ○ Consider supervision requirements for the employee, particularly if they are working from home.
<input type="checkbox"/> Equipment / Technology	<ul style="list-style-type: none"> ○ Is any additional equipment, furniture or space required to make the arrangement possible? For example, laptop or computer/modem for telecommuting. ○ Can technology enhance the effectiveness of flexible work arrangements? For example, use of mobile phones, computer networking, internet and email access at home, teleconferencing into meetings from home etc.
<input type="checkbox"/> Timing of meetings and other events	<ul style="list-style-type: none"> ○ Can regular events, such as staff meetings be scheduled to maximise staff attendance? ○ Ensure part time employees are able to attend other events, such as, training, planning days, social events?

<input type="checkbox"/>	Performance Development	<ul style="list-style-type: none"> ○ Ensure employees on flexible work arrangements have equal access to training and career development opportunities and performance development processes. Consider how work arrangements impact on the employee's ability to achieve the outcomes of their job.
<input type="checkbox"/>	Impact on Co-workers	<ul style="list-style-type: none"> ○ Discuss the new arrangement with co-workers. Address any concerns they may have and develop strategies to ensure other staff are not disadvantaged from this arrangement. Manage resistance and negative attitudes from co-workers that may affect the success of the arrangement. ○ Ensure workloads are managed and co-workers are not picking up additional work that they cannot manage.
<input type="checkbox"/>	Communication strategies	<ul style="list-style-type: none"> ○ Are communication processes sufficient to ensure a smooth flow of information between employees, co-workers, managers and clients? ○ Put strategies in place to ensure effective communication with employees to keep them informed of any changes or important issues arising when they are not present. ○ Will the employee be contactable outside of their normal working hours? How will this be managed?
<input type="checkbox"/>	Problem solving	<ul style="list-style-type: none"> ○ Encourage all staff to raise queries or concerns regarding flexible work arrangements as they arise and effectively deal with these issues without delay.
<input type="checkbox"/>	Grievance Resolution	<ul style="list-style-type: none"> ○ Ensure staff are aware of the grievance resolution procedure available to them if they feel disadvantaged because of another employee's flexible work arrangement.
REVIEW		
<input type="checkbox"/>	Review procedures	<ul style="list-style-type: none"> ○ Consider how the arrangement will be reviewed on an ongoing/periodic basis. When and how will the arrangement be measured? Set time frames for review. ○ Arrangements may be fine tuned over their lifetime to ensure they adapt to changing circumstances.
<input type="checkbox"/>	Establish Criteria	<ul style="list-style-type: none"> ○ The flexible work arrangement agreement should include criteria to assess the outcome of the arrangement against, such as: <ul style="list-style-type: none"> ○ Impact of the arrangement on clients/patients, co-workers and team ○ Impact of the arrangement on the positions effectiveness and job outcomes ○ Impact on supervisory responsibilities ○ The effectiveness of the individuals ability to contribute to the work of the team ○ The individual's performance
<input type="checkbox"/>	Assessment	<ul style="list-style-type: none"> ○ Assess the outcome of the trial or temporary arrangement against the agreed criteria.
<input type="checkbox"/>	Discussion	<ul style="list-style-type: none"> ○ Discuss the arrangement with the employee, co-workers and regular clients (where applicable) to help assess its outcome.
<input type="checkbox"/>	Impact of flexible work	<ul style="list-style-type: none"> ○ Consider what impact the flexible work arrangement had on:

arrangement/s	<ul style="list-style-type: none"> ○ Attraction and Retention of staff ○ Budget ○ Diversity of the workforce ○ Staff morale ○ Staff performance and productivity ○ Employee health and wellbeing (reduction in absenteeism) ○ Employee's ability to balance their work and life.
<input type="checkbox"/> Modifications to arrangements	<ul style="list-style-type: none"> ○ What problems or issues have been raised throughout the duration of the arrangement? How have these been rectified? ○ What further changes can be made to improve the arrangement for any of the parties involved or affected by the arrangement?
<input type="checkbox"/> Support	<ul style="list-style-type: none"> ○ How can arrangements be better supported?
<input type="checkbox"/> Outcome of the Review	<ul style="list-style-type: none"> ○ Following full evaluation and assessment, the future of the flexible work arrangement should be discussed between the parties involved and prior to the expiry of the trial or temporary arrangement a decision made to: <ol style="list-style-type: none"> 1. Discontinue the arrangement 2. Undertake a further trial period 3. Extend a temporary arrangement or 4. Confirm the arrangement on a permanent basis. ○ Parties to the flexible work arrangement agreement must be notified (verbally and in writing) of the outcome and given a clear explanation and reasons for the outcome. ○ All parties should be given an opportunity to raise any questions or concerns and have these addressed.
<input type="checkbox"/> Ongoing communication	<ul style="list-style-type: none"> ○ Are there opportunities for all staff to express views about balancing work and life?